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WEALTH MANAGEMENT

SUSAN ZUREK

Director, Client Services

Susan Zurek joined Laird Norton Wealth Management (LNWM) in 1999 and is currently a director, client services. With more than two decades of experience in trust administration, Susan brings to her client relationships a rare combination of empathy, experience, and expertise. She works closely with LNWM experts in investments, tax strategies, and wealth planning to carry out the intent of the trust's grantor and ensure that the trust continues to abide by all applicable laws and regulations. Susan helps beneficiaries make informed financial choices while also investing the trust assets to meet these goals and objectives. While Susan administers a wide variety of trusts, many of which have been in effect for decades, she is especially known for her work on Special Needs Trusts, set up to support loved ones facing physical or mental disabilities.

One of the distinguishing features of Susan's practice is that she makes it a point to get to know each of her clients personally, building a relationship that lets her advise and inform them throughout their lifetime. As a trust administrator, she educates and guides beneficiaries through a wide variety of financial planning topics – including budgeting, lifestyle mapping, and making financially savvy decisions. She also helps them understand and appreciate the guidelines of the trusts from which they benefit.

Before becoming a client advisor at Laird Norton Wealth Management in 2018, Susan was a client associate and a client analyst, both at LNWM. Prior to that, Susan worked as a trust operations specialist and trust assistant at Shoreline Bank and Trust (now Chemical Bank) in the state of Michigan. She has earned the designations of CTFA (Certified Trust and Financial Advisor) as well as ChSNC® (Chartered Special Needs Consultant) and FPQP™ (Financial Paraplanner Qualified Professional). She has a Bachelor's in Business Administration from Sienna Heights University.